

HELP GUIDE – HOW TO COMPLETE YOUR YEAR 2 UPDATE IN DIAMOND

STEP 1 – LOGIN TO DIAMOND

- The website is otcc.strategicplanningonline.com
- Your username and password are the same as your OTC username and password.

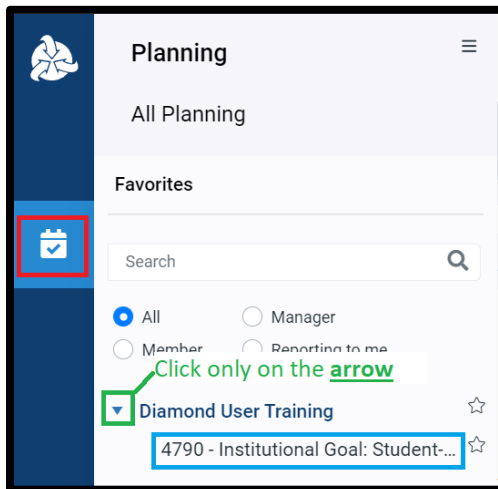
STEP 2 – SELECT THE “2025-2026 (Current)” PLANNING YEAR

- In the upper right corner, ensure the **Planning Year** is **2025-2026**.



STEP 3 – OPEN YOUR THREE-YEAR PLAN

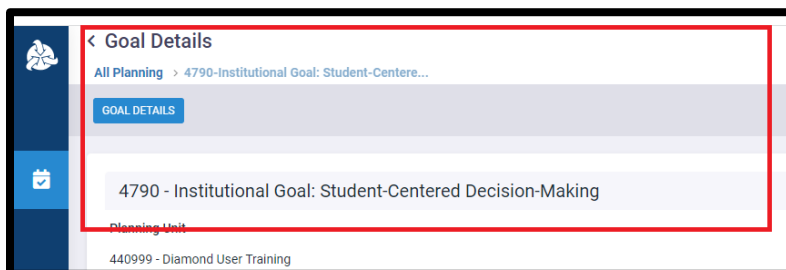
- Click on the **Planning Icon** on the left menu.
- Click the **arrow** next to your Program/Department name to display your Three-Year Plans.
- Click on the **Three-Year Plan** you would like to open.



If your screen does not look like this, in Step 3B, you clicked on your Program/Department name instead of the arrow only.

Repeat Step 3 and click on the **arrow only** in Step 3B.

- The **Goal Details** screen will open for your selected Three-Year Plan.



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STEP 4 – REVIEW AND UPDATE YOUR THREE-YEAR PLAN

- A. Read your Three-Year Plan, and make any updates/edits if necessary, such as:
 1. Anticipated start or end date(s).
 2. Statuses.
 3. Programs/Departments you need assistance from.
 4. What success would look like and how to measure it.
- B. Please refer to the “Help Guide – Entering Your Three-Year Plan in Diamond” for additional information.

STEP 5 – ADD NEW RESOURCE (BUDGET) REQUESTS, IF NEEDED

- A. Add any new budget request items you need to complete the Three-Year Plan.
- B. Please refer to the “Help Guide – Entering Your Three-Year Plan in Diamond” for additional information.

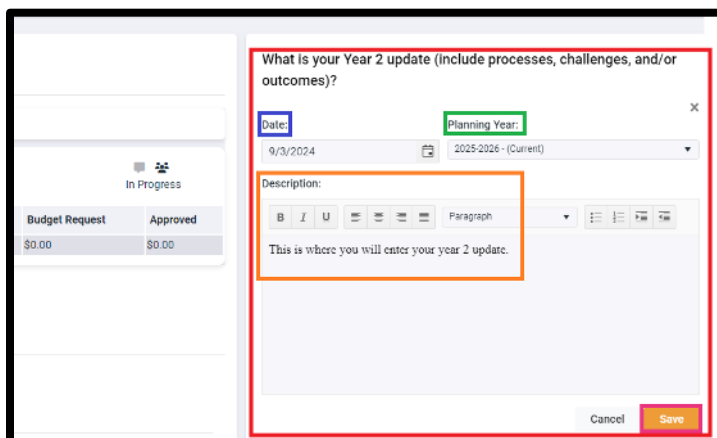
NOTE – if you have a new resource budget request that does not fit into any existing Three-Year Plan, you will need to create a new Plan for the remaining two years. Please refer to the “Help Guide – Entering Your Three-Year Plan in Diamond” for more information.

STEP 6 – ADD YOUR YEAR 2 UPDATE

- A. Scroll down and find “**What is your Year 2 update (include processes, challenges, and/or outcomes)**”.
- B. Hover over the “**What is your Year 2 update...**” heading.
*The line will turn blue and the **add icon** (a blue plus sign) will appear on the right side.*
- C. Click the **Add** icon.



- D. The “**What is your Year 2 update...**” entry screen will open on the right.
 1. You may leave the **Date** as the current date or change it if you would like.
 2. Leave the **Planning Year** as **2025-2026**.
 3. Under **Description**, enter your Year 2 Update.
 4. Click **Save**.



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STEP 7 – SUBMIT YEAR 2 UPDATE FOR APPROVAL

- A. In the upper right corner, choose **Approve Objective** from the drop-down box.



- B. The Approval Notes box will appear. You do not have to enter any notes. Click **Approve**.



- C. You have approved your Year 2 Update, and Diamond notified your **next approval level** (your respective Dean/Vice-Chancellor) your Year 2 Update is ready for review.



**You have completed the Year 2 Update for the selected Three-Year Plan.
Repeat Steps 3-7 for your remaining Three-Year Plans.**